



Cabarrus County Event Management System

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Application Objectives

The Event Management System was conceived as a response to a need for consistent and informative presentation of event content for both the [Cabarrus County Intranet](#) and [Cabarrus County Website](#). As the project planning phase progressed requirements were gathered and goals expanded. The Event Management System is designed to accomplish the following:

1. Present event content in a consistent manner across all sites and sub-sites contained in the Cabarrus County SharePoint environment.
2. Resolve several known issues regarding recurring events in the current solution.
3. Enable event management from a single SharePoint calendar, which feeds both Intranet and Internet sites.
4. Implement multi-level registration and approval functionality for more robust event management.
5. Integrate event details with social media technology and calendar tools.
6. Direct the user to events with similar content via metadata tags.
7. Manage venues and other resources as part of the overall system.
8. Interface with eCommerce systems to accommodate revenue-generating reservations of County facilities and classes.

As the project progresses and new functionality is introduced, this document will be expanded to serve as the primary user guide. The guide includes images and references to the Information Technology department site as an example. Each department will include unique working environments with the department name.

Event Management System Structure

The system includes several distinct objects. These objects deployed in the SharePoint environment and supplemented with custom application code will enable the user to work in a familiar environment while leveraging extended functionality.

Event Calendar Web Part / Events Center

The Event Calendar custom web part developed by Cabarrus County serves as the center of the Event Management System. The Calendar is the main portal for displaying all events across the SharePoint environment.

Department Event Calendar

The department event calendar is the working environment for the event manager. All events are created on this calendar and feed the Event Calendar web part. There is at least one department event calendar for each department site. Some larger departments may have multiple calendars for multiple divisions. For example the Library System includes four distinct department calendars – one for each library branch. Multiple department calendars will be created after determining specific business needs with each department.

Department Event Registration List

The registration list collects all user registration information and accommodates management and reporting of event details requiring registration. This SharePoint list is the second piece of the event manager's work space.

Event Details Web Page

Each event is presented via a custom web page. Rather than using the standard SharePoint dialog box to display event details, the system builds a dynamic page for each event. More information and functionality is offered as compared to the previous system.

Create a New Event

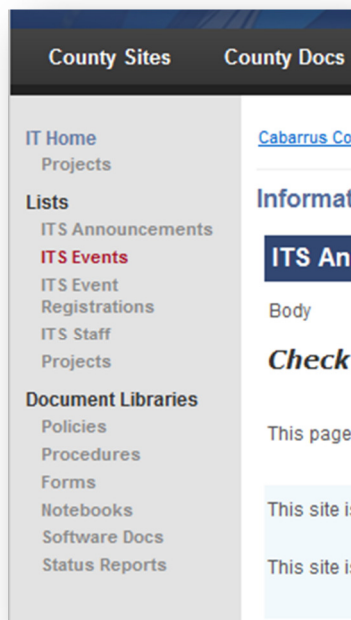
Events are created and managed within the department Intranet sub-site for each department or division thereof.

Navigate to the specific Department Intranet Site

This guide refers to the Information Technology department site throughout. Event managers should use their specific department sites.

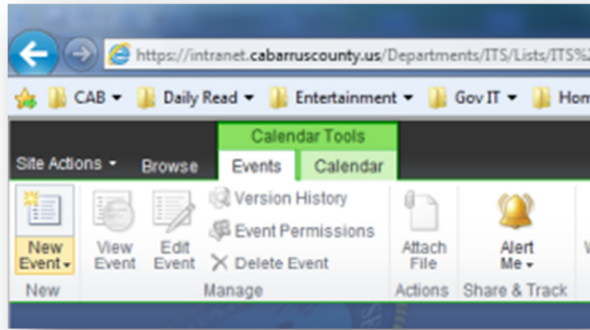
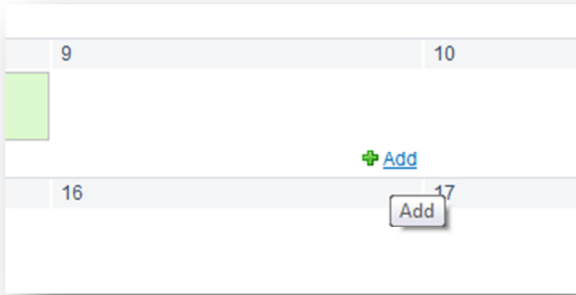


Select the Department Event Calendar from the left navigation panel.



The working event calendar for each department will be uniformly named to include the department or division name and the word Events (e.g., ITS Events, Concord Library Events, Human Resources Events, etc.)

Hover over a specific calendar day and select the **Add button** or select the Events Tab at the top of the screen and select **New Event**.



The new Event data entry form will appear.

The new Event form includes several required fields to accommodate specific functionality within the system.

Enhancements to this form are currently on the project roadmap, including

- Default location and address pick lists
- Ability to add images to Event descriptions
- Ability to tag events with multiple categories
- Ability to tag events with multiple audiences

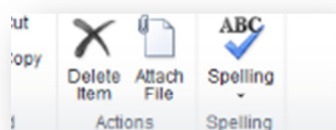
Complete the appropriate data entry fields for the new event.

- **Title** – The title or name of the event. Space is limited. Keep titles clear, targeted and consistent.
- **Start Time** – Date and time for the beginning of the event.
- **End Time** – Date and time for the end of the event.
- **All Day Event** – Override the start and end time to display the event as a full-day item on the calendar.
- **Recurrence** – Initiate the repeating event details. This functionality is described more fully later in this document. [See page 16](#).

- **Description** – Include as much descriptive information as necessary for the event. This will display as the body of the event detail page when customers view the event.
- **Location** – The name of the location (e.g., Cabarrus County Government Center, Multi-Purpose Room, Concord Library Conference Room, etc.)
- **Address** – The street address of the location.
- **City** – The city of the location.
- **State/Province** – The state of the location.
- **ZIP/Postal Code** – The Zip Code of the location.

Note – A valid street address is required for mapping functionality included in the event details page.

- **Public Event** – Checking this box will display the event on the Internet site as well as the Intranet site. Use this for any events intended for public viewing.
- **Event Contact** – Name of contact person. This item links to a list of contact persons, emails and phone numbers maintained by ITS. Additions to the list will be made upon request by submitting a service desk ticket.
- **Event Instructor** – Name of instructor. This item links to a list of instructors maintained by ITS. Additions to the list will be made upon request.
- **Event Audience** – The customer can filter events by selecting the appropriate audience they are interested in. The audience list is maintained by ITS. Additions to the list will be made upon request.
- **Event Category** – Another way to describe your event. In addition to audience, the category can be used to filter and categorize events on the event viewer calendar. The category list is maintained by ITS. Additions to the list will be made upon request by submitting a service desk ticket.
- **Registration Required** – Checking this box will enable the registration functionality. Users can register for the event by submitting their name, email address and phone number.
- **Registration Deadline** – The deadline date is used to disable the registration functionality. Users will no longer be able to register for an event if the deadline has passed. If this field is left blank and the registration required checkbox is checked, the deadline date will default to 24 hours before the start date of the event.
- **Single Registration** – This checkbox relates to recurring event functionality. When checked, it creates a one-time registration deadline before the start date of the first occurrence of the event. When unchecked, the system creates multiple registration deadline dates to align with the occurrences of the event. This functionality is detailed later in this document. [See page 16.](#)
- **Class Size** – The maximum limit of attendees for the event or for each occurrence of the event. If the number of registrants is equal to the class size setting, the registration function will automatically disable.
- **Approval Required** – Checking this box will allow event managers to review and approve each submitted registration.
- **Event Approver** – If approval is required, the registration notifications will route via email to the event approver identified in this field. The event approver list is maintained by ITS. Additions to the list will be made upon request.



Attachments can be added to Events by selecting the Attach File icon at the top of the New Event dialog box.

Events Center

Also known as the **Event Calendar Web Part**, this custom object developed by ITS is the center of the Event Management System for users – both internal and public. An instance of the Events Center will exist on the Internet site to replace calendar views for multiple departments. Another instance will exist on the Cabarrus County Intranet site.

Events

Calendars »

Categories »

Audiences »

Viewing events from all calendars, within all categories, and all audiences. ([Clear Filters](#))

◀ ▶ May, 2013

Expand All Collapse All | 1 Day 7 Week 31 Month

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
28	29	30	1	2	3	4
5	6	7	8	9	10	11
		9:00 am - 11:30 am Pictometry Online Traini	9:00 am - 11:30 am Pictometry Online Traini			
		2:00 pm - 4:30 pm Pictometry Online Traini				
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1

The Events Center will point to each department's event calendar. This will gather information and display events to the public on the Internet site and/or to Cabarrus County employees on the Intranet site.

Navigation and Filtering

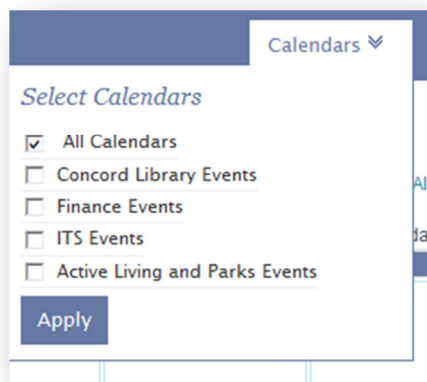
The calendar view is based on a standard SharePoint calendar object; therefore, it includes the basic calendar navigation functionality.

- *Display events in a day, week, or month view and navigate to different dates using the arrows.*

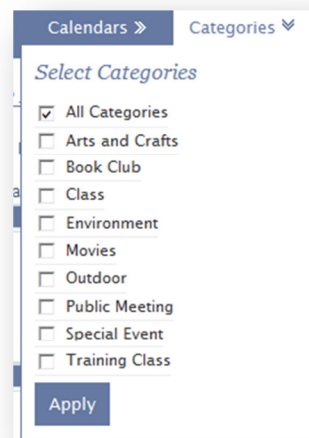


- *Filter the display of events based on specific criteria. One of the key benefits of this system is the customer can choose which events to display by filtering on as many as three criteria.*

Calendars



Categories



Audiences



These descriptive metadata are included on each event to enable filtering and finding similar events, based on the information entered by the event manager.

In addition to the filters, event managers can construct hyperlinks to the Event Center with filters applied.

For example, the Concord Library could link to only the events on their calendar with the following URL:

<https://intranet.cabarruscounty.us/Pages/Events.aspx?Calendars=Concord Library Events>

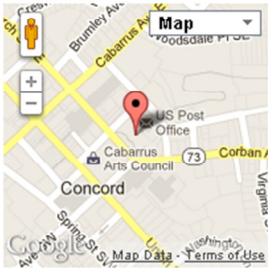
Event Details Page

When the customer selects an event, an event details page is dynamically created. (Previously, customers could see a stock event popup.) The new page includes more information and functionality, and is scalable to accommodate future upgrades to the Event Management System.



View More Events
[Return to Calendar](#)
[View more Class events](#)
[View more Families events](#)
[View more ITS Events](#)

For More Information
704-957-4263
[Nick Roberts](#)

Event Location
65 Church Street S
Concord, North Carolina 28025



Fifty Ways to Rock that Wok
Friday, May 17, 2013 07:00 - 8:30 PM
Cabarrus County Government Center - Suite 211
65 Church Street S
Concord, North Carolina 28025

[Add to Calendar](#)
0

Did you ever wonder what to do with those pesky carcasses found on the highway? Have you ever wanted to make a huge omelet? Or perhaps you just needed a giant cereal bowl.

Come learn 50 ways cleave your brother at the **Rock that Wok Culinary Course**.

Prerequisites include a taste for danger and a low-deductible insurance policy.

- * Cabarrus County is not responsible for the content of this training event.

Instructor: Eric Sossoman

Seats Remaining: 12 (Max: 12)
[Register for this event](#) (Registration Deadline: 5/16/2013)
* - Approval required after registration

Test event requiring registration and approval.

The body of the event page is comprised of the event title, start date (including the day of the week), end date, location name, address and the event description.

Fifty Ways to Rock that Wok
Friday, May 17, 2013 07:00 - 8:30 PM
Cabarrus County Government Center - Suite 211
65 Church Street S
Concord, North Carolina 28025

Did you ever wonder what to do with those pesky carcasses found on the highway? Have you ever wanted to make a huge omelet? Or perhaps you just needed a giant cereal bowl.

Come learn 50 ways cleave your brother at the **Rock that Wok Culinary Course**.

Prerequisites include a taste for danger and a low-deductible insurance policy.

- * Cabarrus County is not responsible for the content of this training event.

If registration and/or approval is required, the Registration Link and information about the class size and remaining seats will display.

Seats Remaining: **12** (Max: **12**)
[Register for this event](#) (Registration Deadline: 5/16/2013)
* - Approval required after registration

The left margin of the event details page includes contact information, the location address with a functional Google map insert and links to similar events.

View More Events

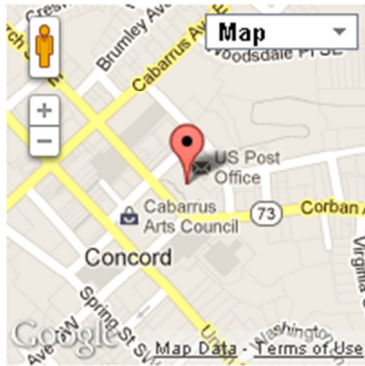
[Return to Calendar](#)
[View more Class events](#)
[View more Families events](#)
[View more ITS Events](#)

For More Information

704-957-4263
[Nick Roberts](#)



Event Location

65 Church Street S
Concord, North Carolina 28025



The **View More Events** functionality will find and connect items with a similar department source **Calendar**, **Audience** and **Category**. It links back to the Event Center calendar and filters for events tagged similarly to the event the customer is currently viewing.

*For example, clicking the **View more Class events** link will display the Event Center calendar filtered for all events tagged with **Class** in the event category.*


* Cabarrus County is not responsible for the content of this	
Location	Cabarrus County Government Center - Suite 211
Address	65 Church Street S
City	Concord
State/Province	North Carolina
ZIP/Postal Code	28025
Public Event	No
Event Contact	Nick Roberts
Event Instructor	Eric Sossoman
Event Audience	Families
Event Category	Class
Registration Required	Yes
Registration Deadline	5/16/2013
Single Registration	Yes
Class Size	12
Approval Required	Yes
Event Approver	Nick Roberts
Content Type: Cabarrus Event	
Created at 5/9/2013 7:58 PM by Nick Roberts 	
Last modified at 5/9/2013 8:06 PM by Nick Roberts 	

Registration and Approval

Registration and Approval functionality elevate the Event Management System from a simple calendar tool to a robust application. Additional functionality focused on class and facility management is included on the application roadmap. Event managers can categorize events as **Information Only**, **Registration Required** and **Approval Required**.

Information Only

Advertise events without the need to track attendees. Create events without the “**Registration Required**” or “**Approval Required**” checkboxes checked to advertise events for information only.


Event Category *	Arts and Crafts ▼
Registration Required	<input type="checkbox"/>
Is registration required for this event?	
Registration Deadline	<input type="text"/> 
Date by which user must register.	
Single Registration	<input checked="" type="checkbox"/>
For a recurring event, do you only want a single beginning date?	
Class Size *	<input type="text" value="0"/>
Approval Required	<input type="checkbox"/>
Event Approver	(None) ▼

*The Event will display without the **Register for this Event** link on the event details page.*

Registration Required

Advertise and manage attendees. Registrant information is gathered and class size limitations are enforced.

Select the **Registration Required** checkbox when creating a new event. Enter the maximum number of attendees in the **Class Size** field and choose a **Registration Deadline** date. *Note – if a registration deadline date is not provided, the system will default to a date 24 hours prior to the start date of the event.*

Event Category *	Arts and Crafts ▼
Registration Required	<input checked="" type="checkbox"/>
Is registration required for this event?	
Registration Deadline	5/9/2013 
Date by which user must register	
Single Registration	<input checked="" type="checkbox"/>
For a recurring event, do you only want a single beginning date?	
Class Size *	<input type="text" value="10"/>
Approval Required	<input type="checkbox"/>

When the event manager selects the **Registration Required** field, additional information and functionality will appear on the **Event Details** page.

Seats Remaining: 12 (Max: 12)
[Register for this event](#) (Registration Deadline: 5/16/2013)

Attendees may select the **Register for this Event** link to open the data entry fields required for registration.

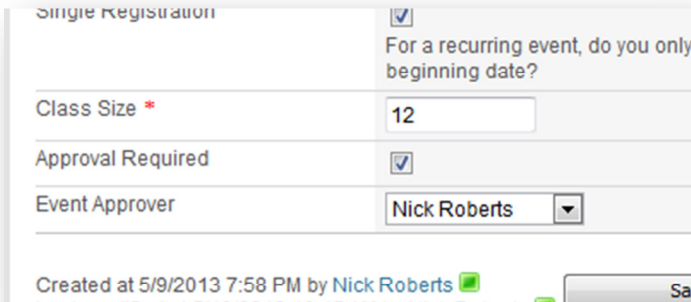
Required fields include first name, last name, phone number and email address.

Error-checking scripts will ensure the same attendee does not register multiple times for the same event.

Approval Required

Advertise, manage attendees and enforce prerequisite qualifications for attendance.

In addition to configuring the registration details described in the previous section, event managers can review each registration submittal before attendees are confirmed for an event by selecting the **Approval Required** checkbox and selecting an **Event Approver** from the list.



Single Registration ☒ For a recurring event, do you only beginning date?

Class Size * 12

Approval Required ☒

Event Approver Nick Roberts

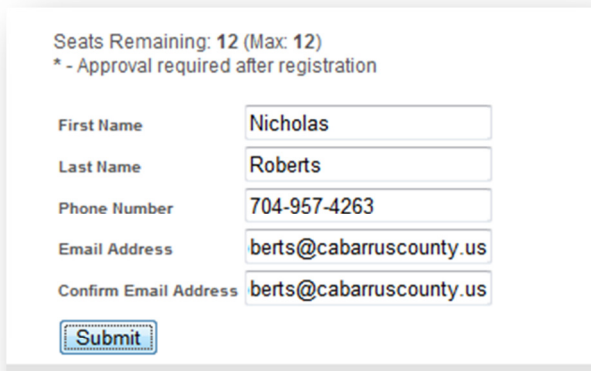
Created at 5/9/2013 7:58 PM by Nick Roberts

On the event details page, customers will receive notification stating, *"Approval is required after registration."*

Seats Remaining: 12 (Max: 12)
[Register for this event](#) (Registration Deadline: 5/16/2013)
* - Approval required after registration

Approval Process

The registration process begins when an attendee selects the **Register for this Event** link on the event details page. The attendee enters specific information.



Seats Remaining: 12 (Max: 12)
* - Approval required after registration

First Name Nicholas

Last Name Roberts

Phone Number 704-957-4263

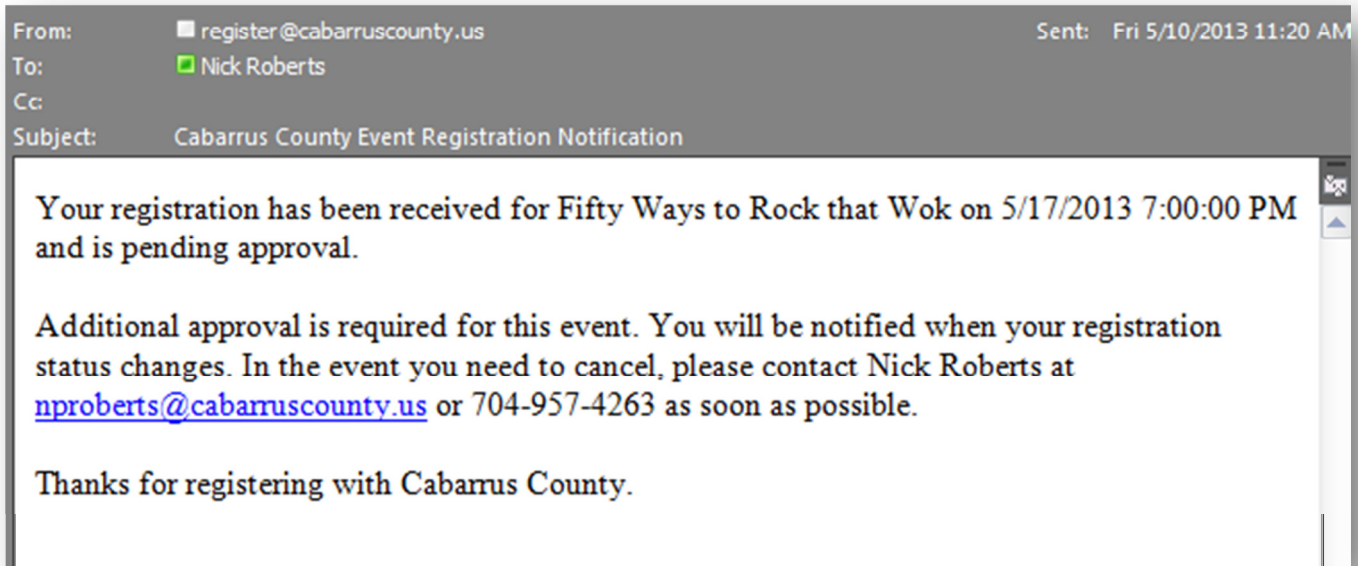
Email Address berts@cabarruscounty.us

Confirm Email Address berts@cabarruscounty.us

If approval is required, customers who submit registration information will receive an auto-generated email notification of their pending status.

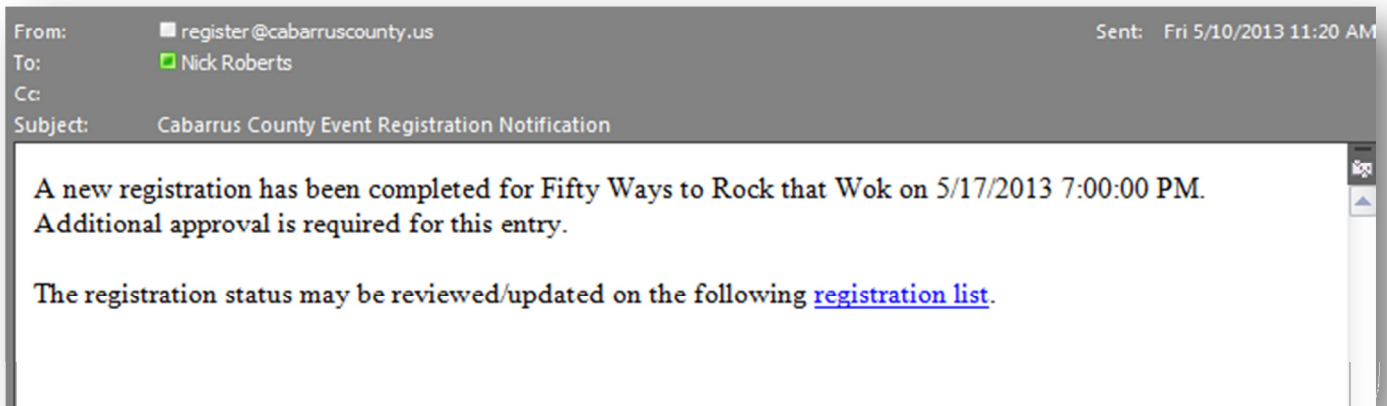
All registration information will appear in a SharePoint list within the specific Department Site.

Email to Attendee when Approval is Required



The email to the customer indicates additional approval is required and does not include a calendar item attachment. Specific information from the event, including the contact information, is included in the email.

Email to Approver when Approval is Required



The email sent to the approver includes a link to the **Registration List**. The approver will navigate to the list and either approve or disapprove the registration request.

ITS Event Registrations > RegistrationReview							
	Event Title	Event Date	Registrant First Name	Registrant Last Name	Approval Status	Email	Phone Number
	Fifty Ways to Rock that Wok	5/17/2013 7:00 PM	Nicholas	Roberts	Submitted	nproberts@cabarruscounty.us	704-957-4263
	Pictometry Online Training	5/8/2013 9:00 AM	Dennis	Isenhour	Approved	dcisenhour@cabarruscounty.us	704-920-2573
	Pictometry Online Training	5/8/2013 9:00 AM	Bob	Kinsey	Approved	jrkinsey@cabarruscounty.us	704-920-2874
	Pictometry Online Training	5/8/2013 9:00 AM	Michelle	Seaford	Approved	mhseaford@cabarruscounty.us	704-920-2325

To edit the registration request, hover over the item until the Edit icon appears.

ITS Event Registrations ▶ RegistrationReview ▾

	Event Title	Event Date	Registrant F
	Fifty Ways to Rock that Wok	5/17/2013 7:00 PM	Nicholas
	Pictometry Online Training	5/8/2013 9:00 AM	Dennis
	Pictometry Online Training	5/8/2013 9:00 AM	Bob
	Pictometry Online Training	5/8/2013 9:00 AM	Michelle

Select the Edit icon to enable the fields for update.

ITS Event Registrations ▶ RegistrationReview ▾

	Event Title	Event Date	Registrant First Name
	Fifty Ways to Rock that Wok	5/17/2013 7 PM 00	Nicholas
	Pictometry Online Training	5/8/2013 9:00 AM	Dennis
	Pictometry Online	5/8/2013 9:00 AM	Bob

Navigate to the Approval Status column. Select the appropriate status.

Last Name	Approval Status	Email	Phone
	Submitted ▾	nproberts@cabarrusco	704-9
	Submitted	dcisenhour@cabarrusco.us	704-9
	Approved		
	Denied		
	Cancelled		
	Approval Status		
	Approved	mhseaford@cabarrusco.us	704-9

Select the Save Icon (blue disk) to the left of the registration request.

ITS Event Registrations ▶ RegistrationReview ▾

	Event Title
	Fifty Ways to Rock that Wok
	Pictometry Online Training

Saving changes to registration request items will generate another email to the attendee indicating the status.

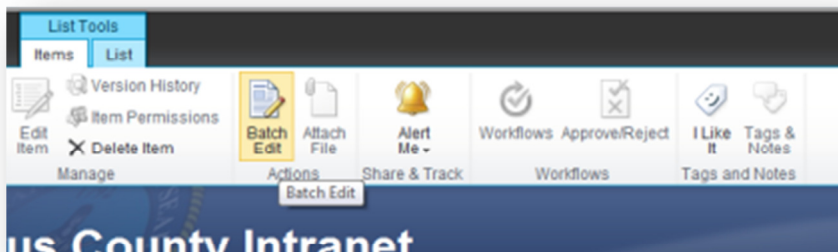
NOTE – selecting the Red X button will cancel any changes made.

Registration requests can be edited by batch as needed.

Select multiple registration requests by selecting the checkbox to the left of the item.

ITS Event Registrations ▸ RegistrationReview ▾				
<input type="checkbox"/>	Event Title	Event Date	Registrant First Name	Registrant Last Name
<input checked="" type="checkbox"/>	Fifty Ways to Rock that Wok	5/17/2013 7:00 PM	Nicholas	Roberts
<input checked="" type="checkbox"/>	Fifty Ways to Rock that Wok	5/17/2013 7:00 PM	Brad	Eudy
<input checked="" type="checkbox"/>	Pictometry Online Training	5/8/2013 9:00 AM	Dennis	Isenhour
<input checked="" type="checkbox"/>	Pictometry Online Training	5/8/2013 9:00 AM	Bob	Kinsey
<input type="checkbox"/>	Pictometry Online Training	5/8/2013 9:00 AM	Michelle	Seaford
<input type="checkbox"/>	Pictometry Online Training	5/8/2013 9:00 AM	Bill	Kouri
<input type="checkbox"/>	Pictometry Online Training	5/8/2013 9:00 AM	Dennis	Testerman

After selecting the events, select the **Batch Edit** button from the toolbar at the top of the screen.



The **Batch Edit** dialog box will display the data fields for event registrations.

Modify the **Approval Status** in the dialog box and select the Ok button (at the bottom of the screen) to make the change to each of the selected registrants.

Batch Edit Items

Event Date
 12 AM 00

Approval Status
Submitted

Comments

EventID

Event Recurring ID

Location

Attendees for each registration request will receive notification of the change in status via email. The email includes any comments entered in the **Comments** field when modifying the registrations.

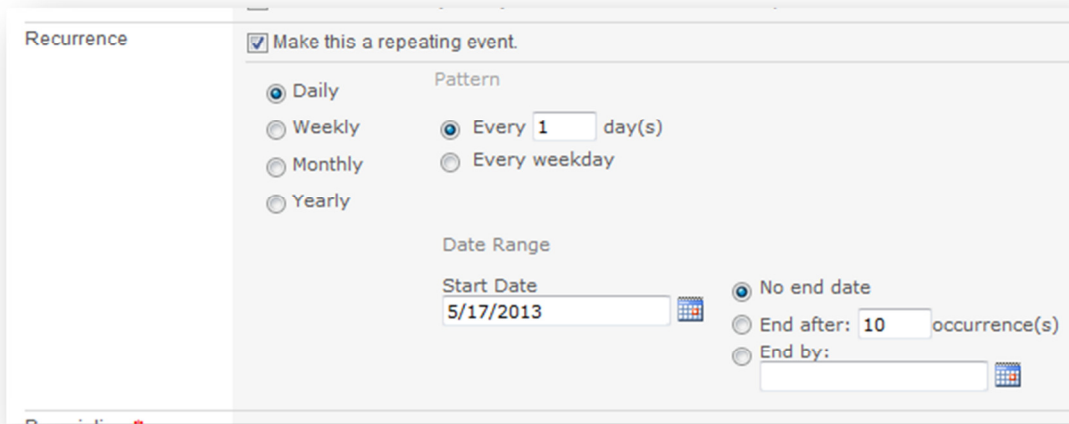
Recurring Events

There are two distinct forms of recurring events. In this document we will distinguish the two by example.

The first is a *single event scheduled regularly* like a *class* or a Board of Commissioners meeting. The second type of recurring event takes place as a *course* or *one event which is spread across multiple dates and times*, like a CPR course that meets three times, once a week, over the span of three weeks.

Functionally, the event manager will modify one setting to distinguish between the two types of recurring events.

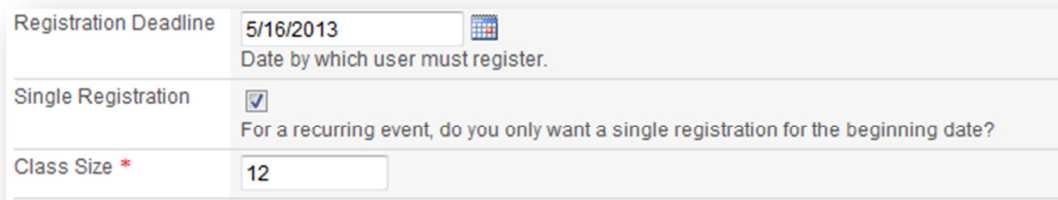
When creating a new event select the **Make this a Repeating Event** checkbox to enable the recurrence pattern.



The screenshot shows a 'Recurrence' dialog box. At the top, there is a checkbox labeled 'Make this a repeating event.' which is checked. Below this, there are two columns. The left column contains radio buttons for 'Daily', 'Weekly', 'Monthly', and 'Yearly'. The right column, under the heading 'Pattern', contains radio buttons for 'Every 1 day(s)' (selected) and 'Every weekday'. Below these, there is a 'Date Range' section with a 'Start Date' field set to '5/17/2013' and a calendar icon. To the right of the 'Start Date' field are three radio button options: 'No end date' (selected), 'End after: 10 occurrence(s)', and 'End by:' followed by an empty date field and a calendar icon.

Determine the type of recurring event, single or multiple, by selecting specific items in the recurrence section of the event dialog box.

If registration is required and the event is recurring, the event manager will either select or deselect the **Single Registration** checkbox.



The screenshot shows a 'Registration' section with three rows. The first row is 'Registration Deadline' with a date field set to '5/16/2013' and a calendar icon, with the text 'Date by which user must register.' below it. The second row is 'Single Registration' with a checked checkbox and the text 'For a recurring event, do you only want a single registration for the beginning date?'. The third row is 'Class Size *' with a text field containing the number '12'.

When selected, the system will create one registration deadline date before the first instance of the course, which spreads over multiple dates. This aligns with the course-type option (e.g., a class scheduled over several weeks).

When deselected, the system will create individual registration deadline dates prior to and for each occurrence of the event. This aligns with the *class-type option* (e.g., regularly-scheduled public meeting).